



# Price List Utilities

For Dynamics CRM 2016



Microsoft Dynamics CRM

SettingsProduct Catalog

Adam McAma  
DPS

NEWDELETEEMAIL A LINKPRICE LIST UTILITIESRUN REPORTEXCEL TEMPLATESEXPORT TO EXCEL

Active Price Lists

Name	Currency	Start Date	End Date
Customers 2016	Pound Sterling		
Customers 2017	Pound Sterling		
Partners 2016			
Partners 2017			



### Welcome to the Price List Utilities 2016

This tool provides a set of intuitive wizards which will assist you in adding, copying, updating or removing the price lists. You can also use export and import facility if you require a more detailed level of control.

Each wizard will guide you through the price list procedure. You can preview and change selections before updating the data in the Microsoft Dynamics CRM.

#### Wizard Selection

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**  
Add new price list items to your price list.
- ☐ **Update Price List Wizard**  
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**  
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**  
Remove existing records from your price lists.
- ☐ **Import Price List Wizard**  
Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**  
Export product price list to a flat file.

CancelBackNext



# Price List Utilities

- Price List Utilities is an add-on application specially designed for Microsoft Dynamics CRM.
- Written in HTML 5 it seamlessly integrates with the latest version of the Microsoft Dynamics CRM 2016
- Packaged as managed solution is fully compatible with all types of the deployment (on-premises, live).
- No client or server side installation needed.
- This product is licensed per organization.



# Price List Utilities

- **With its intuitive wizard driven interface you will be able to:**
  - add new price lists to multiple products
  - update pricing information globally (by percentage or fixed amount)
  - copy price lists from one product to multiple products
  - copy price lists from one price list to multiple pricelists
  - remove unwanted price list items
  - import or update price lists from a flat file
  - export price list to a file which can be used later as a source for import.




# **ADD PRICE LIST WIZARD**



# Choose a wizard to complete.

- Select the price list procedure you wish to complete.
- Appropriate wizard will guide you through the procedure.

**Wizard Selection**

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**  
Add new price list items to your price list.
- ☐ **Update Price List Wizard**  
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**  
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**  
Remove existing records from your price lists.
- ☐ **Import Price List Wizard**  
Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**  
Export product price list to a flat file.

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# Select a price list and restrictions.

- Select a price list you wish to update by adding new price list items. Specify product range.

**Price List and Restrictions**  
Specify price list, unit group and products. Price list items can only be added to the products which share the same unit group.

**PRICE LIST AND UNIT**  
Price List\* [Customers 2016](#)  
Unit Group\* [Business User \(sample\)](#)

**PRODUCT RANGE**  
First Product ID [CRM Online: Enterprise \(sample\)](#)  
Last Product ID [SharePoint Online \(sample\)](#)


[Cancel](#) [Back](#) [Next](#)




# Specify pricing details.

- Specify information for new price list item

**Pricing Details**  
Specify unit of measure, quantity selling options and pricing method.



**PRICING**

Unit*	Standard User (sample)
Discount List	--
Quantity Selling Option*	No Control
Pricing Method*	Currency Amount
Amount*	<input type="text" value="250"/> X
Currency	 Pound Sterling

Cancel

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# Specify rounding details.

- Specify rounding details.
- This screen is not available if you have specified Currency Amount as a Pricing Method.

**Rounding Details**  
Specify rounding policy and options.

**ROUNDING**

Rounding Policy	<b>Up</b>
Rounding Option*	<b>Ends in</b>
Rounding Amount*	<input type="text" value="0.05"/>

Cancel

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# Preview the records to be added.

- Preview the records to be processed.

Preview

Preview the records to be Added and verify your selections.

Select All

Select None

All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit	
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Customers 2016	Standard...	▲
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	Exchange Online (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	Lync Online (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	Office Desktop for Midsize & Enterprise (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	Office Desktop for Small Business Premium (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	SharePoint Online (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Enterprise (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Midsize (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Small Business (sample)	Customers 2016	Standard...	
<input checked="" type="checkbox"/>	Office 365 for Enterprise (sample)	Customers 2016	Standard...	▼

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50 items per page

1 - 15 of 15 items

Cancel

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# Preview the records to be added.

- use “Select All” button to quickly select records on all pages
- use “Select None” button to deselect records on all pages and mark records individually
- use filters to identify records

**Preview**  
Preview the records to be Added and verify your selections.

Select All Select None All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Custc	Show items with value that: Is equal to
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Custc	
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Custc	
<input checked="" type="checkbox"/>	Exchange Online (sample)	Custc	And
<input checked="" type="checkbox"/>	Lync Online (sample)	Custc	Is equal to
<input checked="" type="checkbox"/>	Office Desktop for Midsize & Enterprise (sample)	Custc	
<input checked="" type="checkbox"/>	Office Desktop for Small Business Premium (sample)	Custc	Filter Clear
<input checked="" type="checkbox"/>	SharePoint Online (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Enterprise (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Midsize (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Small Business (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 for Enterprise (sample)	Customers 2016	Standard...

< < 1 > > 50 items per page 1 - 15 of 15 items

Cancel Back Next



# Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

**Review**  
Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.

Setting	Value
Action	Add Price List
Price List	Customers 2016
Unit Group	Business User (sample)
Products	CRM Online: Enterprise (sample) : SharePoint Online (sample)
Price List Items to Add	15
Unit	Standard User (sample)
Discount List	Not Specified
Quantity Selling Option	No Control
Pricing Method	Currency Amount
Amount	250.00

CancelBackNext



# Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

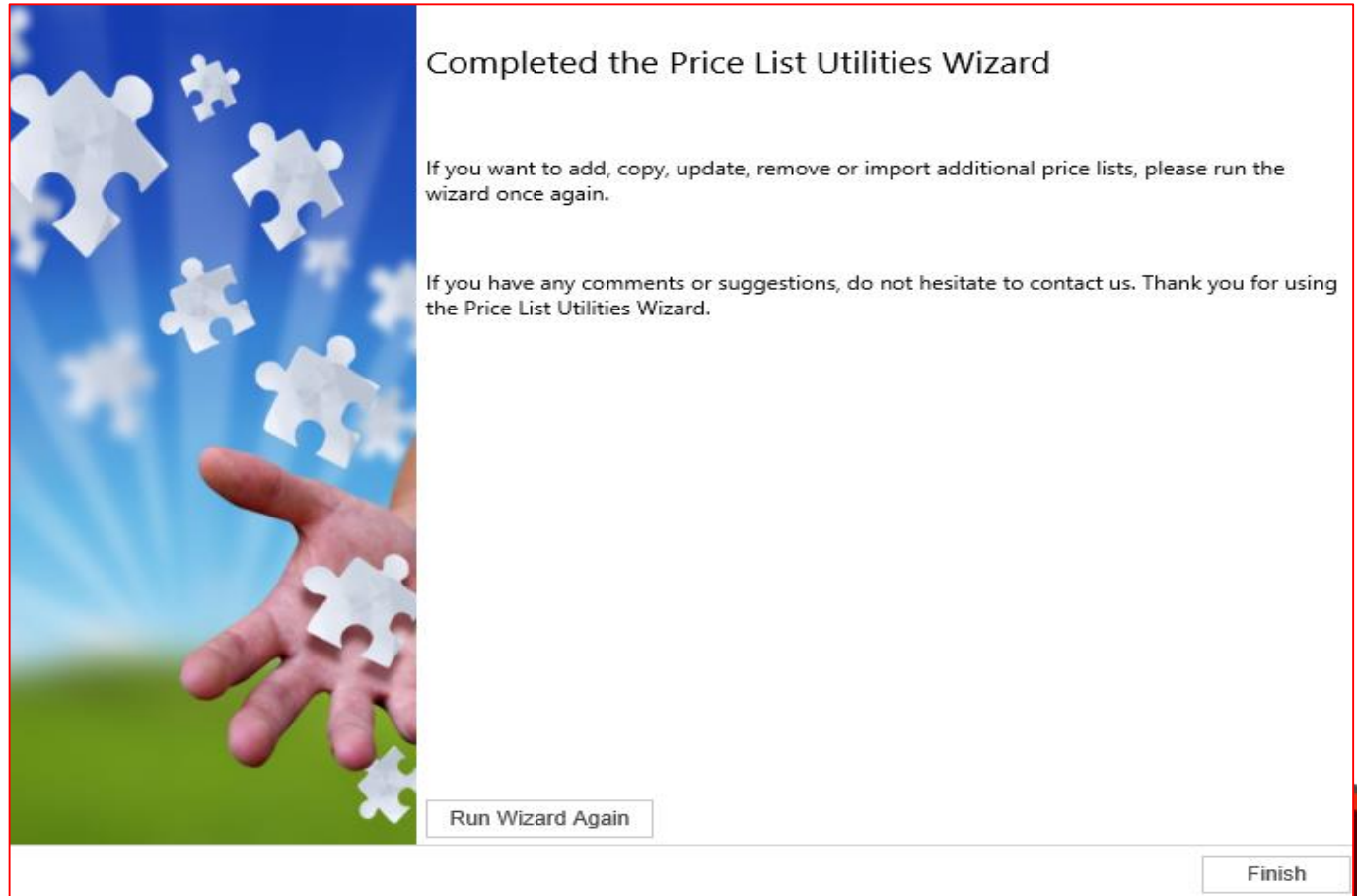
**Review**  
Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.

Setting	Value
<b>Action</b>	Add Price List
<b>Price List</b>	Customers 2016
<b>Unit Group</b>	Business User (sample)
<b>Products</b>	CRM Online: Enterprise (sample) : SharePoint Online (sample)
<b>Price List Items to Add</b>	15
<b>Unit</b>	Standard User (sample)
<b>Discount List</b>	Not Specified
<b>Quantity Selling Option</b>	No Control
<b>Pricing Method</b>	Currency Amount
<b>Amount</b>	250.00



# Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.






# **UPDATE PRICE LIST WIZARD**



# Choose a wizard to complete.

- Let's see how you can update existing records in your price list.

**Wizard Selection**

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**  
Add new price list items to your price list.
- ☒ **Update Price List Wizard**  
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**  
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**  
Remove existing records from your price lists.
- ☐ **Import Price List Wizard**  
Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**  
Export product price list to a flat file.



# Enter restrictions.

- You can update price list for a group of products that share the same pricing method.
- You can update multiple price list items at the same time.

**Price Lists and Restrictions**  
Specify pricing method, price list and products to update. Only items with the same pricing method can only be updated at the same time.

**PRICE LIST RANGE**  
First Price List [Customers 2016](#)  
Last Price List [Customers 2017](#)

**PRODUCT RANGE**  
First Product ID   
Last Product ID

Pricing Method*	Currency Amount
-----------------	-----------------

Cancel

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# Specify update details.

- Indicate how the price list information should be updated.

**Pricing Details**  
Specify how to update the pricing details. The update type depends on the pricing method.

**UPDATE BY**  
☒ Percentage  
☐ Fixed Value

**EXAMPLE**  
Current Price = \$120  
Update by Percentage  
Amount = 10%  
New Price =  $\$120 + (10\% * \$120) = \$132$

Amount (%)\*7.50000

Cancel

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# Preview the records to be updated.

- Preview the records to be processed.

Preview

Preview the records to be Updated and verify your selections.

Select All

Select None

All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit	Current	Updated
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Exchange Online (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Lync Online (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	SharePoint Online (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office Desktop for Small Business Premium (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office Desktop for Midsize & Enterprise (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Enterprise (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Midsize (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Small Business (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office 365 for Enterprise (sample)	Customers 2016	Standard...	250.00	268.75

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Cancel

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# Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

**Review**  
Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.

Setting	Value
<b>Action</b>	Update Price List
<b>Selected Items</b>	15
<b>Price Lists</b>	Customers 2016 : Customers 2017
<b>Products</b>	All
<b>Amount (%)</b>	7.5

CancelBackNext



# Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

**Processing**  
Wizard is currently processing your data. It may take several minutes to complete.

Processing complete

Product:	Office 365 and CRM Online: Small Business (sample)
Price List:	Customers 2016
Unit:	Standard User (sample)
Updated:	15
Skipped:	0
Errors:	0

Cancel

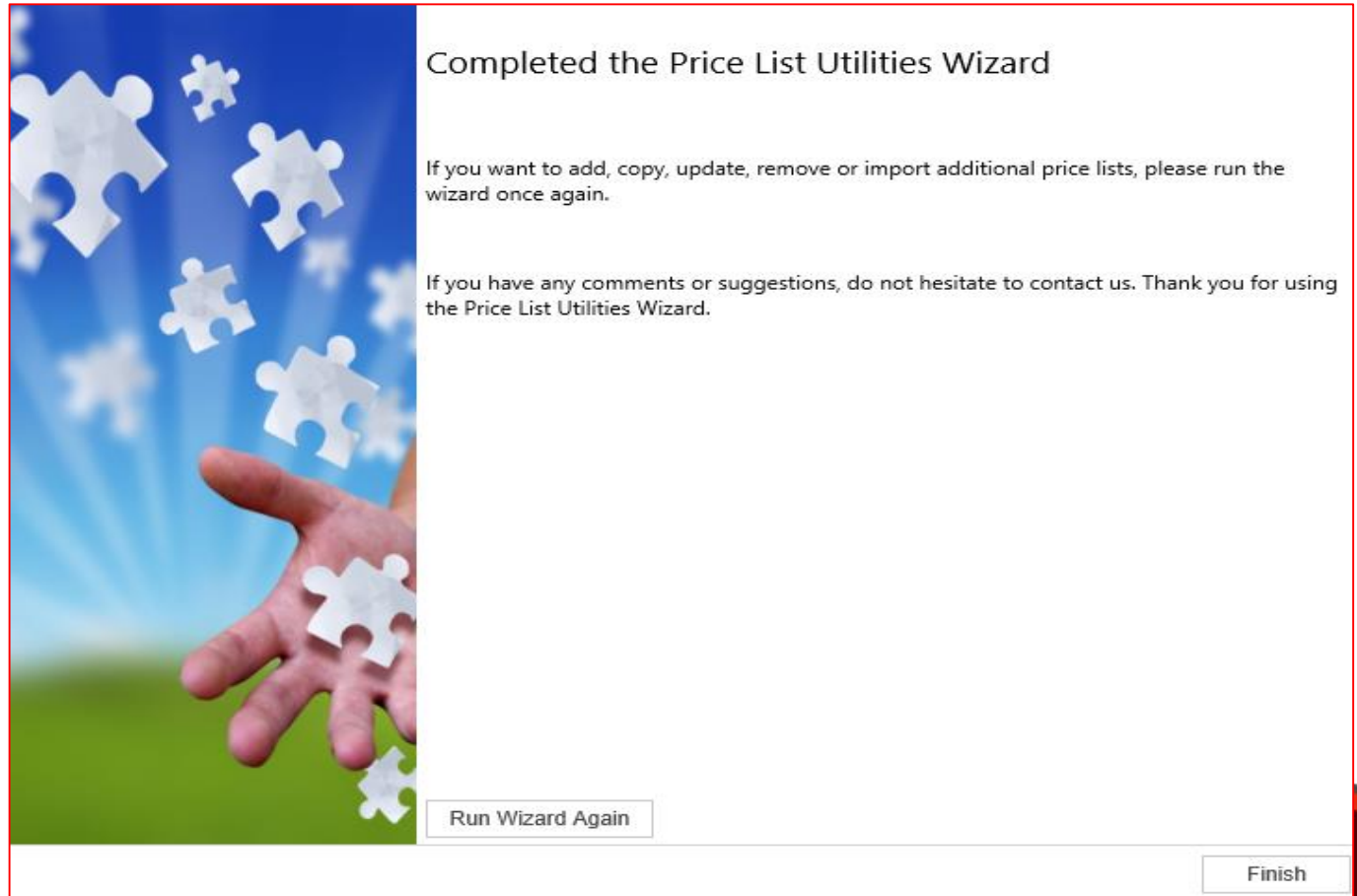
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# Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.





# **COPY PRICE LIST WIZARD**



# Choose a wizard to complete.

- Let's see how you can copy existing price list from a source product to a range of similar products.

**Wizard Selection**  
Select the price list procedure to complete.

☐ **Add Price List Wizard**  
Add new price list items to your price list.

☐ **Update Price List Wizard**  
Update existing records in your price lists.

☒ **Copy Price List Wizard**  
Copy existing price list to your other products.

☐ **Remove Price List Wizard**  
Remove existing records from your price lists.

☐ **Import Price List Wizard**  
Import or update product price list from a flat file.

☐ **Export Price List Wizard**  
Export product price list to a flat file.

Cancel

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# Select a source (Product or Price List)

- Select how you want to copy information.
- You can copy price list items:
  - from one Price List to one or more pricelists
  - from one Product to other

**Copy Price List Source**  
Select a source product or price list which price list items you want to copy to other products.

**COPY FROM (SOURCE)**  
☐ Product ☒ Price List  
Source Price List\* [Customers 2016](#)

**COPY TO (DESTINATION)**  
☐ Single price list ☒ Multiple price lists  
First Target Price List [Partners 2016](#)  
Last Target Price List [Partners 2017](#)  
First Product ID [CRM Online: Enterprise \(sample\)](#)  
Last Product ID [CRM Online: Standard \(sample\)](#)

[Cancel](#) [Back](#) [Next](#)



# Specify Target Price List.

- This screen will only be available when you copy to multiple price lists.

Target Price Lists

Select one or more target price lists to which the source price list will be copied to.

Select All

Select None

All items selected

<input checked="" type="checkbox"/>	Price List	<div></div>
<input checked="" type="checkbox"/>	Partners 2016	<div></div>
<input checked="" type="checkbox"/>	Partners 2017	<div></div>

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items per page

1 - 2 of 2 items

Cancel

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# Preview the records to be copied.

- Preview the records to be processed.

Preview

Preview the records to be Copied and verify your selections.

Select All

Select None

All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Partners 2017	Standard...

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50 items per page

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Cancel

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# Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

**Review**  
Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.

Setting	Value
<b>Action</b>	Copy Price List
<b>Source Price List</b>	Customers 2016
<b>Source Price Lists</b>	Partners 2016 : Partners 2017
<b>Selected Items</b>	6
<b>Products</b>	CRM Online: Enterprise (sample) : CRM Online: Standard (sample)



# Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

**Processing**  
Wizard is currently processing your data. It may take several minutes to complete.

Processing complete

Product:	
Price List:	Partners 2016
Unit:	Standard User (sample)
<b>Copied:</b>	6
<b>Skipped:</b>	0
<b>Errors:</b>	0

Cancel

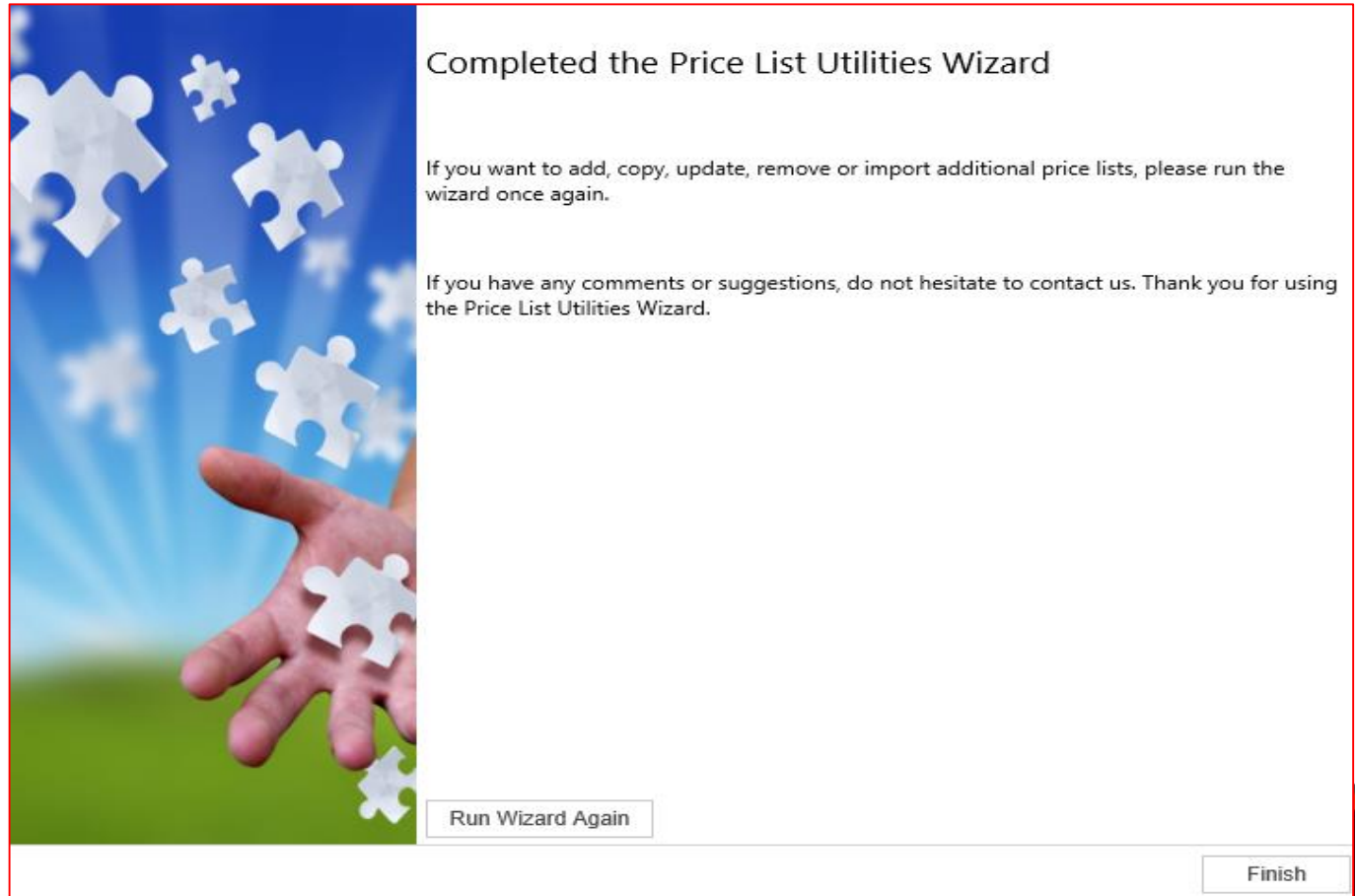
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# Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.






# **REMOVE PRICE LIST WIZARD**



# Choose a wizard to complete.

- Let's see how you can remove existing price list records.

**Wizard Selection**

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**  
Add new price list items to your price list.
- ☐ **Update Price List Wizard**  
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**  
Copy existing price list to your other products.
- ☒ **Remove Price List Wizard**  
Remove existing records from your price lists.
- ☐ **Import Price List Wizard**  
Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**  
Export product price list to a flat file.



# Enter restrictions.

- Enter restrictions to limit price list items that will be removed.
- Use Price List or Products as ranges.

**Removal Restrictions**  
Enter restrictions to limit the price list items that will be removed.

**PRICE LIST RANGE**

First Price List

Partners 2016

Last Price List

Partners 2017

**PRODUCT RANGE**

First Product ID

--

Last Product ID

--

Cancel

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# Preview the records to be removed.

- Preview the records to be processed.

Preview

Preview the records to be Removed and verify your selections.

Select All

Select None

All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Lync Online (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Office Desktop for Midsize & Enterprise (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Office Desktop for Small Business Premium (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	SharePoint Online (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Exchange Online (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Enterprise (sample)	Partners 2016	Standard...

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50 items per page

1 - 18 of 18 items

Cancel

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# Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

**Review**  
Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.

Setting	Value
Action	Remove Price List
Selected Items	18
Price Lists	Partners 2016 : Partners 2017
Products	All

Cancel

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# Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

**Processing**  
Wizard is currently processing your data. It may take several minutes to complete.

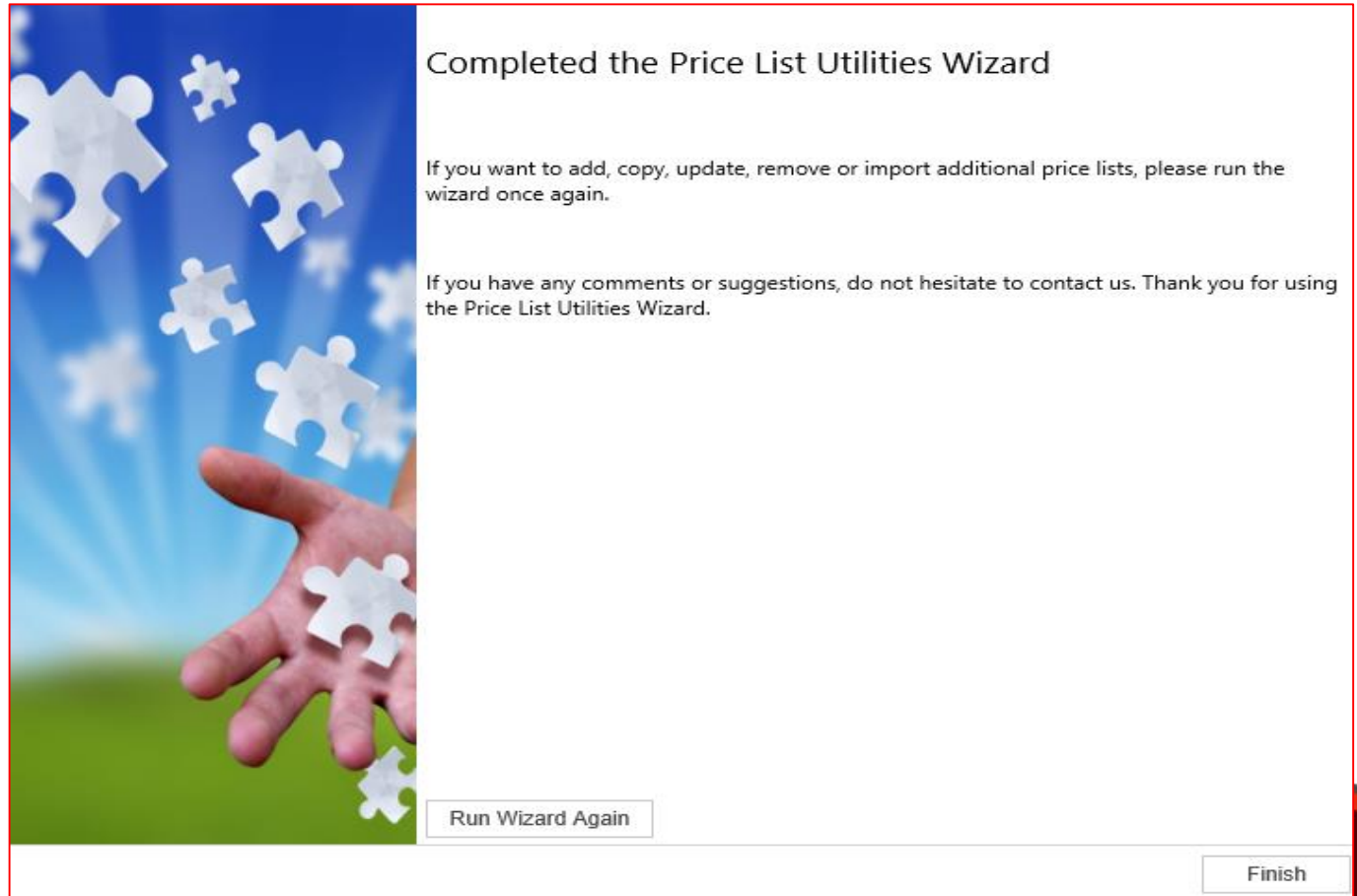
Processing complete

Product:	Exchange Online (sample)
Price List:	Partners 2016
Unit:	Standard User (sample)
Removed:	18
Skipped:	0
Errors:	0



# Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.






# **IMPORT PRICE LIST WIZARD**



# Choose a wizard to complete.

- Let's see how to import or update existing price list items

**Wizard Selection**

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**  
Add new price list items to your price list.
- ☐ **Update Price List Wizard**  
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**  
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**  
Remove existing records from your price lists.
- ☒ **Import Price List Wizard**  
Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**  
Export product price list to a flat file.



# Select an input file.

- Select a file that contains price list items to import or update.

**Import File**  
Select a file that contains price lists to import and specify its format.

**FILE**  
Input File\*    
Field Separator\* **Comma (,)**  
Data Delimiter\* **Double Quote (")**  
☒ First row contains column headings



# Map fields.

- Map source import file fields to CRM Entity fields.

**Fields Mapping**  
Map fields from the input file to the CRM price list fields.

Import	Target	Source	Sample
<input checked="" type="checkbox"/>	Amount	Amount	268.75
<input checked="" type="checkbox"/>	Discount List	Discount List	
<input checked="" type="checkbox"/>	Percentage	Percentage	
<input checked="" type="checkbox"/>	Price List	Price List	Customers 2016
<input checked="" type="checkbox"/>	Pricing Method	Pricing Method	Currency Amount
<input checked="" type="checkbox"/>	Product	Product	CRM Online: Profession...
<input checked="" type="checkbox"/>	Quantity Selling Option	Quantity Selling Option	No Control
<input checked="" type="checkbox"/>	Rounding Amount	Rounding Amount	
<input checked="" type="checkbox"/>	Rounding Option	Rounding Option	
<input checked="" type="checkbox"/>	Rounding Policy	Rounding Policy	
<input checked="" type="checkbox"/>	Unit	Unit	Standard User (sample)

Cancel

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# Input file validation.

- Validate the input file.

**Import File Preview**  
Preview the lines to be imported.

Amount	Discount List	Percent...	Price List	Pricing Method	Product	Quantity Se
268.75			Customers 2016	Currency Amount	CRM Online: Professional (sample)	No Control ^
268.75			Customers 2016	Currency Amount	Exchange Online (sample)	No Control
268.75			Customers 2016	Currency Amount	Lync Online (sample)	No Control
268.75			Customers 2016	Currency Amount	CRM Online: Standard (sample)	No Control
268.75			Customers 2016	Currency Amount	CRM Online: Enterprise (sample)	No Control
268.75			Customers 2016	Currency Amount	SharePoint Online (sample)	No Control
268.75			Customers 2016	Currency Amount	Office Desktop for Small Business Premium (sample)	No Control
					Office Desktop for	v

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50 items per page

1 - 15 of 15 items

Cancel

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# Review settings.

- Verify settings you have selected.
- Use “Back” button if you wish to make any changes

**Review**  
Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.

Setting	Value
<b>Action</b>	Import Price List
<b>File Name</b>	PRLU_Customers_2016.txt
<b>Selected Items</b>	15


CancelBackNext



# Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

**Processing**  
Wizard is currently processing your data. It may take several minutes to complete.



Processing complete

Product:	Office 365 for Small Business (sample)
Price List:	Customers 2016
Unit:	Standard User (sample)
<b>Processed:</b>	15
Skipped:	0
<b>Errors:</b>	0

Cancel

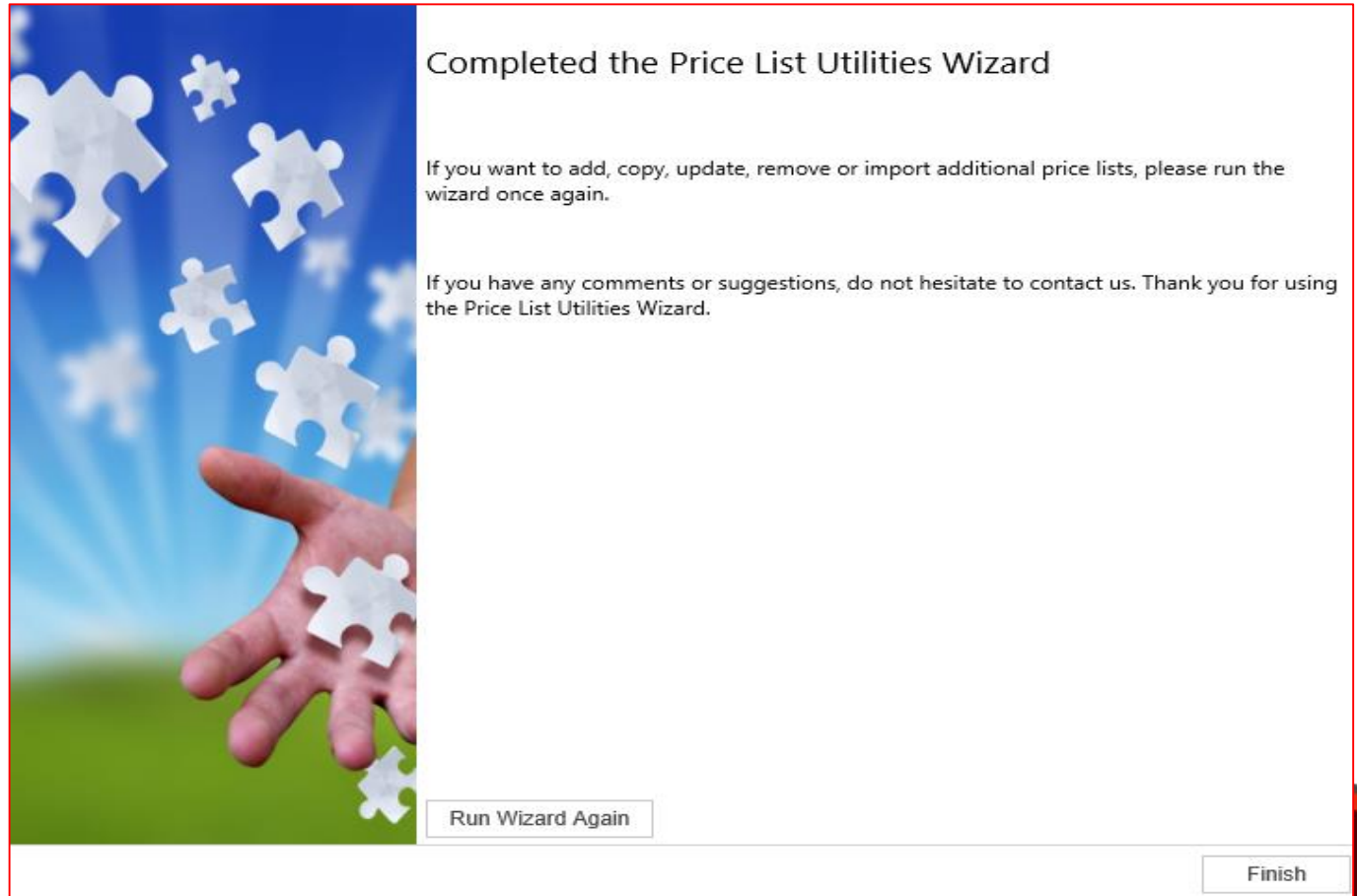
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# Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.






# **EXPORT PRICE LIST WIZARD**



# Choose a wizard to complete.

- Let's see how to export existing price list items

**Wizard Selection**

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**  
Add new price list items to your price list.
- ☐ **Update Price List Wizard**  
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**  
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**  
Remove existing records from your price lists.
- ☐ **Import Price List Wizard**  
Import or update product price list from a flat file.
- ☒ **Export Price List Wizard**  
Export product price list to a flat file.


CancelBackNext



# Specify export range.

- Select how you want to identify records to export (by Price List or by Product)

**Export Range**  
Select products and/or price lists to export. You can export price list items for the selected price list or product.



**EXPORT**

☒ by Price List  
☐ by Product

**EXPORT RANGE**

Price List*	<a href="#">Customers 2016</a>
First Product ID	<a href="#">CRM Online: Enterprise (sample)</a>
Last Product ID	<a href="#">SharePoint Online (sample)</a>

Cancel

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# Specify export file.

- Select location and format for the export file

**Export Destination**  
Select export file and file format.

**DESTINATION AND FORMAT**

Export File Name*	PRLU_Customers_2016.txt	×
Field Separator*	Comma (,)	

Cancel Back Next



# Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

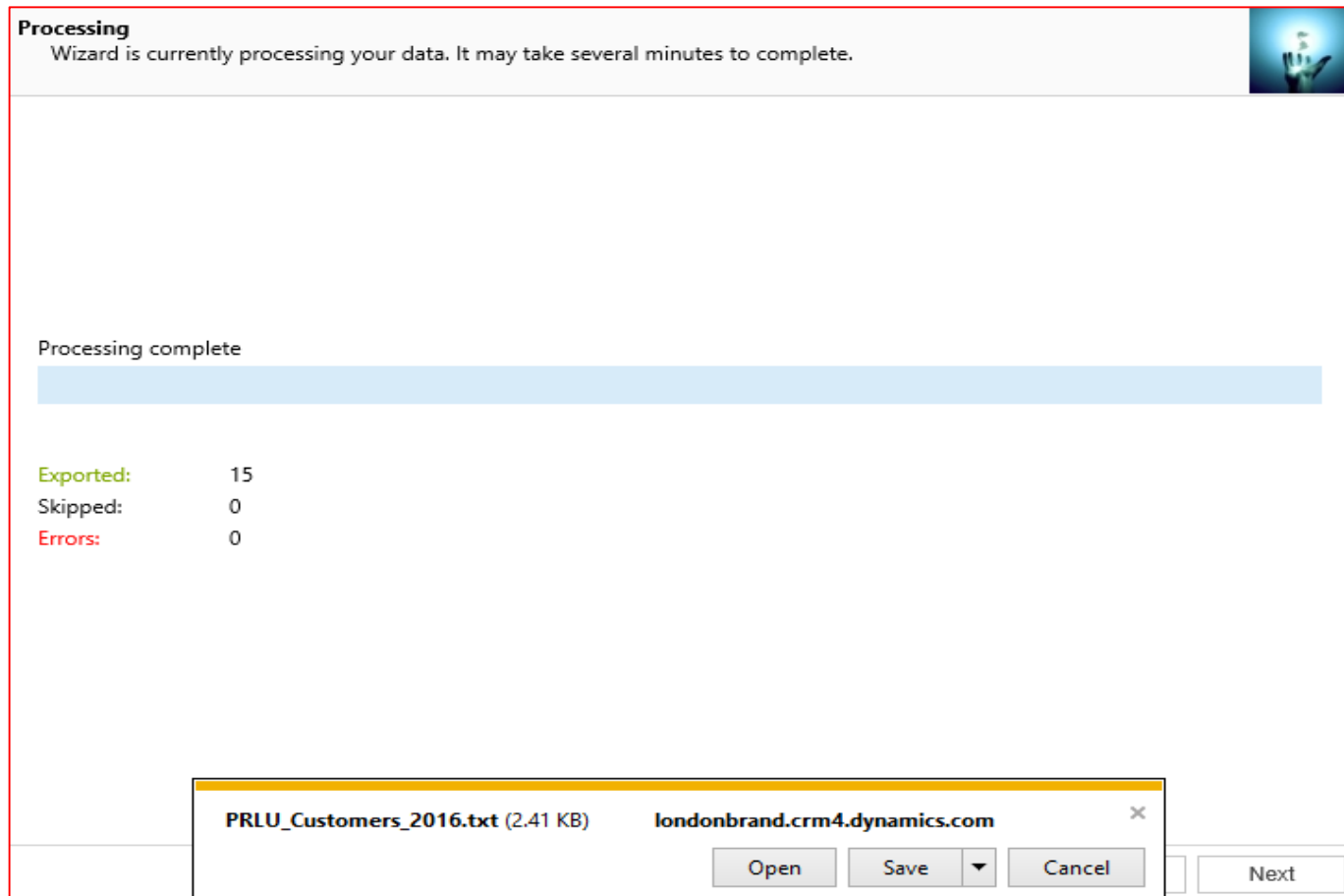
**Review**  
Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.

Setting	Value
<b>Action</b>	Export Price List
<b>Price List</b>	Customers 2016
<b>Products</b>	CRM Online: Enterprise (sample) : SharePoint Online (sample)
<b>File Name</b>	PRLU_Customers_2016.txt
<b>Field Separator</b>	Comma (,)



# Processing.

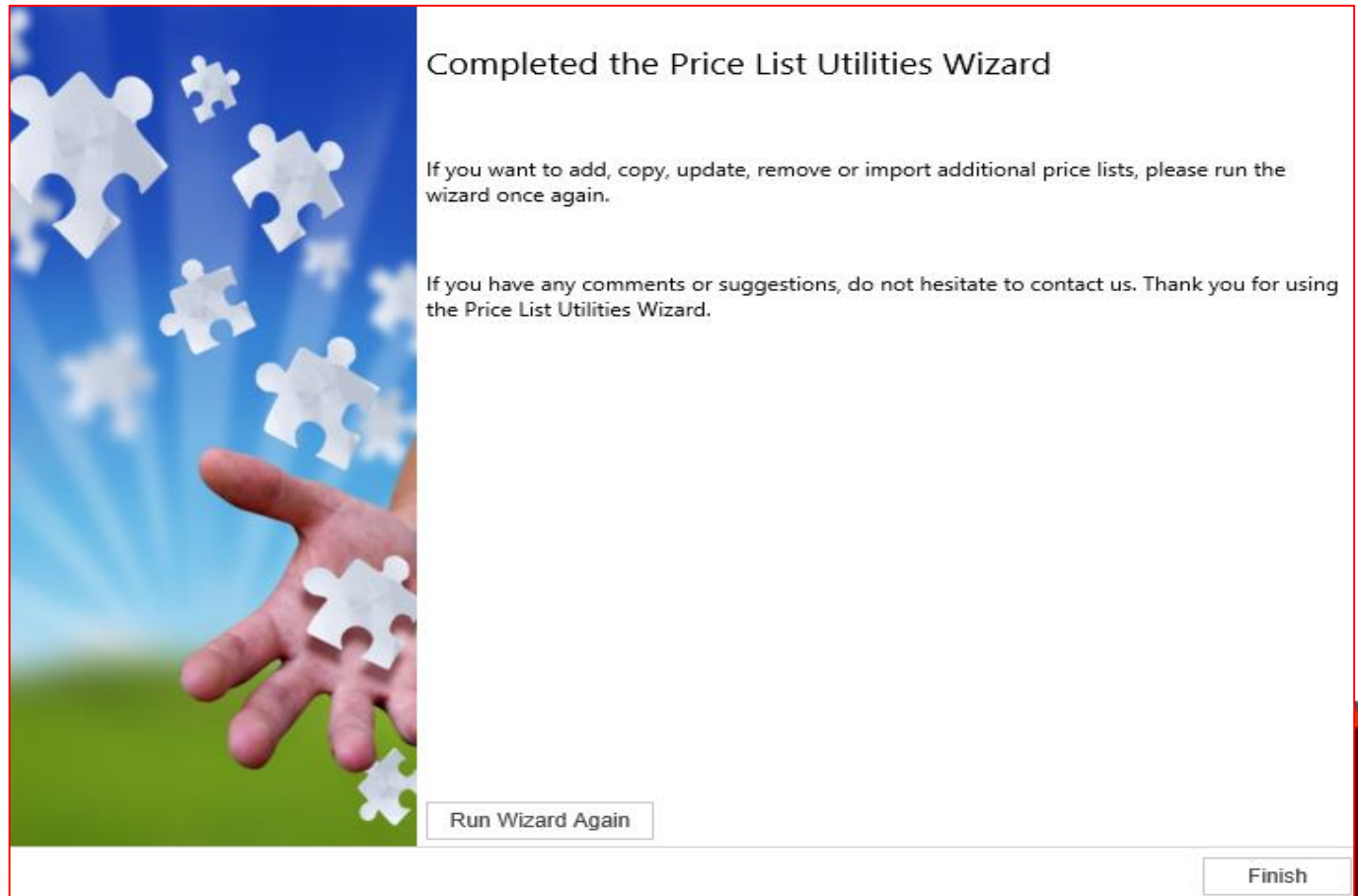
- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.





# Completed the Price List Utilities Wizard.

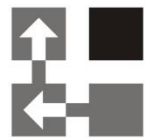
- If you want to run another wizard you can run Price List Utilities again.





# Price List Utilities

- **With its intuitive wizard driven interface you will be able to:**
  - add new price lists to multiple products
  - update pricing information globally (by percentage or fixed amount)
  - copy price lists from one product to multiple products
  - copy price lists from one price list to multiple pricelists
  - remove unwanted price list items
  - import or update price lists from a flat file
  - export price list to a file which can be used later as a source for import



**D Y N A M I C S**

P R O F E S S I O N A L   S O L U T I O N S

**Download :** <http://downloads.dynamics-pros.com>

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The image features three stylized human figures. The central figure is red, and the two flanking figures are blue. They are positioned on a base composed of overlapping, wavy shapes in shades of red and yellow. The background is white.

# Thank You!

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